

April 2003

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Recommended Citation

Lugg, Rick (2003) "ATG Interviews Sara Randal and Harry Samuels," *Against the Grain*: Vol. 15: Iss. 2, Article 17.

DOI: <https://doi.org/10.7771/2380-176X.4027>

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ATG Interviews Sara Randal and Harry Samuels

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TOPIC: Open URL Linking for Collections and Technical Services

In our series of articles on the Virtual Approval Plan concept, which appeared in the June 2002 issue of *ATG*, we explored in general terms tools that might be used to create links from a library selector's integrated library system (ILS), or other source, to a range of extended metadata and services—allowing a library selector or acquisitions staff member to access additional data and services.

In past issues, we've looked more closely at specific tools, including *WebBridge* (designed and built by *Innovative Interfaces*) and *SFX* (owned by *Ex Libris*). In this interview, we'll look at *LinkFinderPlus*, the link resolver offered by *Endeavor Information Systems*.

A link resolver such as *LinkFinderPlus* accepts a query from an OpenURL-enabled source, and, using a library-maintained database of links, presents the user with a list of available resources [targets]. Once the user selects a target, the link resolver directs the user to the target, retaining the metadata captured from the source. Configuring and maintaining target resources in the link resolver are among the most important tasks in making this sort of resource linking effective. In the conversation that follows, we'll focus on options for populating and maintaining those links. First, some background:

ATG: *LinkFinderPlus* is one component of the *ENCompass* system. Could you briefly

describe *ENCompass* and how the components relate to one another?

SR & HS: We usually talk about three components. First, there's *ENCompass for Resource Access*, which a lot of people refer to as a federated search engine. The user sends a single search to multiple databases, which brings back all results in a single display in *ENCompass*. It supports multi-protocol searches, including Z39.50, XML Gateway, and http. Second, *ENCompass for Digital Collections*, which allows libraries to provide their own digital content over the Web. It also integrates searches across those digital collections, the library's OPAC, and Z39.50 resources. The third piece is *LinkFinderPlus*, which is an OpenURL resolver. It can take input from OpenURL source, and link the user to a designated target resource or service.

ATG: How many customers do you have at present?

SR & HS: There are 96 *LinkFinderPlus* sites, 75 of which are part of *ENCompass* installations, and the rest of which are standalone sites.

ATG: *LinkFinderPlus*, like its competitors, relies on receiving requests in OpenURL format. That NISO standard is still under development from version 0.1 to 1.0 — can you update us briefly on where that stands?

SR & HS: [Harry Samuels] is a member of the NISO committee working on this. The committee does have a timeline, which projects going to testing of version 1.0 of the OpenURL standard this Spring.

ATG: In the meantime, though, 0.1 serves the purpose?

SR & HS: Yes, 0.1 really is a de facto standard.

ATG: Can *LinkFinderPlus* accept an OpenURL request from any "valid" source? Your literature specifically mentions *FirstSearch*, *ProQuest*, *EBSCOhost*, *Gale*, and *Engineering Village* as "proven" — but I assume there are many more?

SR & HS: Yes, in fact we've tested with more sites than appear in our literature right now. It's difficult to keep up with the number of sites that want to provide this kind of interoperability. We've yet to find a resource that sends out OpenURLs where we can't process it.

ATG: So there's a specific testing process *Endeavor* goes through with each source?

SR & HS: No, actually there isn't. We'll do it if it's been requested by the content provider or if there's a mutual customer that wants testing. But we got to a point where it was just too difficult to try to keep up with everyone who was announcing that they were OpenURL-compliant. We're really getting to a stage where it's more like the Z39.50 model, where someone says they communicate OpenURL (whether on sending or receiving end) and interoperability is assumed.

ATG: Hmm, sort of like a standard! And if it doesn't work out, there's some problem solving after the fact...

SR & HS: Yes. What we have run into is that a user can optimize the OpenURL to the different link resolvers out there, so that a content provider may find that with *LinkFinderPlus*, we can do this instead of that, but it's all within the standard.

ATG: What advantages do you think *LinkFinderPlus* has that sets it apart from other link resolvers? Are there things you think it does especially well?

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Interview — Dekker from page 57

the educational and research communities will benefit ourselves as well.

ATG: So what has Dekker done to be proactive in the larger community?

DD: In 1997, we established the **Dekker Foundation** with the goal of extending financial support for educational and research purposes. Because today's struggling undergrad may be tomorrow's Nobel Prize-winning physicist, we've established a number of scholarships and fellowships in conjunction with well-respected associations.

In addition to our larger awards, the Foundation also makes annual donations to causes

such as Freedom of Speech, combating homelessness, medical relief, literacy, and environmental preservation. Even though these issues may seem unrelated to Dekker's objectives as an STM publisher, as members of a global community, we believe they are in fact all very interrelated.

ATG: Tell us about David Dekker himself. Do you have a family? What do you do for fun?

DD: I live in Weston, CT with my wife Jen, a schoolteacher, and two great kids, a girl and a boy. I try to introduce my kids to different activities, so hiking and skiing are things we like to do as a family. I strongly believe in having a well-rounded and balanced life.

ATG: With your busy schedule, do you find time for some pleasure reading?

DD: I'm currently reading *Two for the Summit*, by Geoffrey Norman, which is a memoir that reflects on the author's relationship with his daughter through their shared experiences and love of climbing. It's well-written and touches on things which are important to me, such as spending time with my kids, conservation, and getting out into nature.

ATG: Any final thoughts for our readers?

DD: I hope that I have provided some insights on Dekker's business process and philosophy and that libraries will continue to avidly work with good independent publishers and not just the mega-conglomerates. We are always interested in discussing Dekker as a publishing choice for them. 

SR & HS: Well, one is ease of implementation. We offer a large database of pre-populated sources. We've just introduced a batch activation service, based on a file from a company like **Serials Solutions**, that allows a library to easily activate its e-journal subscriptions all at once.

For users, who want to get quickly from link to full text, we have an "invoke" feature. If the librarian sets a journal to "invoke," the OpenURL request doesn't bring up an intervening screen for the user to choose from — it takes them directly to the full text. We're finding that's very popular.

We also allow the library to organize the order in which the full text links appear. If there's a link they'd prefer their patrons to use, they can place that higher in the list. It gives the library control over the display of the information.

ATG: You mentioned "pre-population" of targets in *LinkFinderPlus*. Your literature states that it contains 11,000 such links — already worked out and tested with partners?

SR & HS: It's a little hard to say what a pre-populated link looks like, and actually there are more than that, when you think about the fact that each journal can appear in multiple sites. So, with a list of 13-14,000 journals, the number of targets is actually much higher. In our most recent release, we've provided full-text linking for aggregator-level articles, so the full text in things like **ProQuest** or **Gale** also dramatically increases the number of journals available.

ATG: Are all of the pre-populated links for e-journals or are there other kinds of resources there as well?

SR & HS: In *LinkFinderPlus*, the user can manage this full-text linking through the "knowledge base." For other types of links, *LinkFinderPlus* provides a separate database of "extended services." Within the system, we've given the customer a way to configure extended services pretty easily, but we also pre-populated some we thought would be useful, for example, title or ISBN searches into ILS systems, both ours and others. We pre-populated with syntax for **Syndetic Solutions**, **Amazon**, and other Internet searching.

ATG: In the screen shots you sent [which are reproduced below], extended services are divided into Service Groups and Service Types. Could you describe the distinction?

SR & HS: Service groups are library defined, to organize extended services in ways that make sense to them. These examples are from our demo server — including categories such as "Check for Print Holdings," "Check Other Library Catalogs" and "Search the Internet" — but if you went out to a library site, they might have very different groupings.

The Service Types, including more specific options, like "Horizon Title Search" or "INNOPAC ISBN Search" are known search syntaxes — the only thing that changes is the server name to which the links resolve. All the

library has to do to configure these is add the IP address or server name to that service type, and they don't have to do any additional work.

to the user if the link is broken at the time of the request?

SR & HS: Right. If that link doesn't validate, it won't be presented to the user.

ATG: Is there some kind of notification sent to the administrator — to pursue a fix of a broken link?

SR & HS: Things like this are typically handled in our periodic updates to the database, so that users don't have to chase them down.

ATG: And how often do those occur?

SR & HS: It's really up to the individual sites. We maintain a master database, and *LinkFinderPlus* customers can obtain updates from it on whatever schedule they choose. From some of our content partners, we get updates every six weeks, but there are other links we can fix as we become aware of them. Customers can synch up with it and get any new links added and any changes we've made.

ATG: I'd like to hear more about what's involved in est-

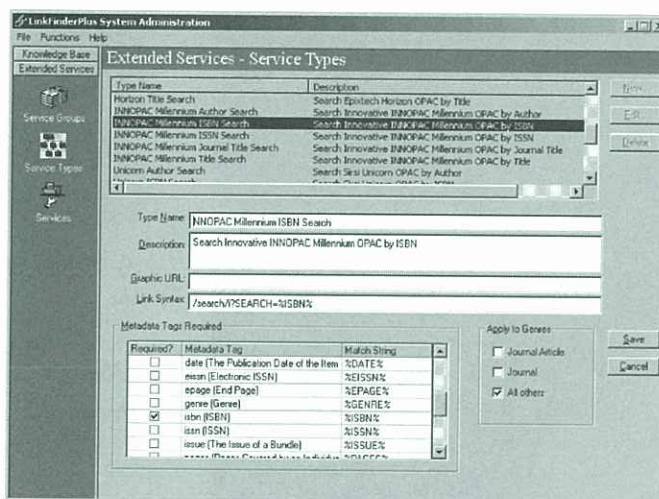
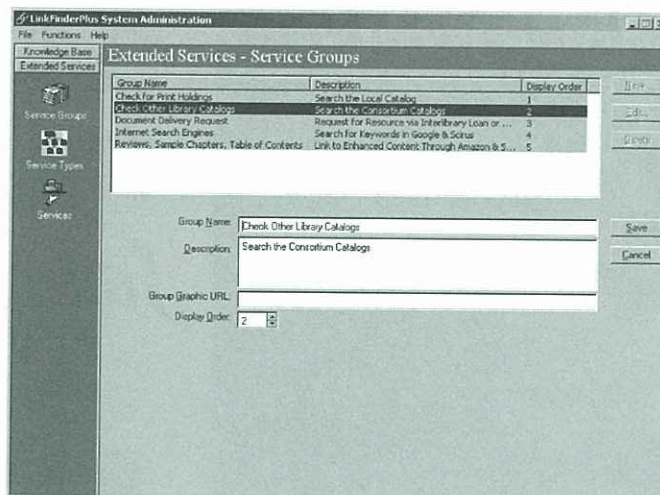
ablishing a new target — let's say an extended service that's not pre-populated. If we imagine a library selector searching *WorldCat* who has found a citation for a book s/he wants to order, it should be possible to link from that citation to a Service Groups menu that includes "Search Book Vendor databases" or "Order from Book Vendor" and Services such as "ISBN Search in GOBI" or "Title Search in Collection Manager" or "Select in Casalini Web" or "Order using OttoEditions" — assuming, of course, that these targets had been added to the *LinkFinderPlus* database. Can you describe the process a librarian would use to add targets?

SR & HS: Initially it would be a new extended service, and it's actually pretty easy. The administrator chooses "add" and in some cases could simply cut and paste the URL from the target site into that new extended service and replace the actual ISBN with a variable called "ISBN" to create the syntax.

The administrator can also specify a service name and description, add a graphic URL (like a logo), then the Web address where that service lives.

If individual or group login is required,

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ATG: Are any of the pre-populated links especially popular among customers?

SR & HS: The widely-distributed services like **JSTOR**, **Academic IDEAL** (now part of **ScienceDirect**) — and of course, the links to the major aggregators.

ATG: Do they bring the user to a sign-on screen or deeper into the product?

SR & HS: For content providers that use IP authentication, of course, there's no issue. As long as the user is within the subnet of the customer, they can get in. Occasionally, you can embed login information into the URL you use to link with. And sometimes, you just have to sign in. IP authentication is probably the most common.

ATG: Your product information refers to "real-time validation" of links. Can you say a bit about how that works?

SR & HS: We have a check-box for each target, which if checked tells *LinkFinderPlus* to check the link before presenting it to the user. One of the things that frustrates users the most is dead links, whether the target is unavailable for an hour or a day. This checking eliminates dead links for the user.

ATG: So there's simply no link presented

and then continue the search or transaction.

ATG: *When the search syntax needs to be worked out for a new target, does the library do that? Does Endeavor help them with it?*

SR & HS: In general, the libraries would do that themselves, because they're the ones who actually have access to the resource and can use the URLs that are going through to test it. On the other hand, we certainly have customer support that will help.

We're also bringing up a resource sharing area on our customer Website, so that if one institution were to develop a link syntax for, say, **GOBI**, they could post it there for other **LinkFinderPlus** customers to use — so everyone doesn't have to reinvent the wheel.

We're currently working with our customers to understand the degree to which they want to see the Extended Services pre-populated. We do offer pre-populated sources now, but wonder when does it become more noise than help? So that's one of the things we're waiting to get feedback on.

ATG: *What's next for the development of this product?*

SR & HS: We want to keep adding more targets, because the emphasis seems to be on full text and the number of full text sites you can link to. As much as we have, there's room to add more. We'll also look at the area of extended services — we don't have anything particular in mind right now, but there are some capabilities in there we can further leverage. We also need to stress functionality that already exists but is underutilized — such as linking directly to the target without an intermediary page.

The **LinkFinderPlus** database captures a tremendous amount of information, and we're also thinking about how else we might use it to support some other library activities related to electronic resource management. So I think that's a very interesting place to look at re-utilizing this information to help libraries avoid entering duplicate data in multiple places.

The batch activation feature which we've worked on with **Serials Solutions** has proved to be a popular, and labor-saving solution. The larger the library, the more electronic subscriptions, the more labor it saves. So we're looking to partner with other companies in that same space. It's a good opportunity for companies to team up and provide some added value.

ATG: *Although we realize that OpenURL linking is predominantly a citation to full text product, we remain convinced that the same approach can save work in Acquisitions and Cataloging. Any comment?*

SR & HS: In our **Voyager** system, we do provide support for OpenURL linking from the Acquisitions and Cataloging clients. That allows use of the same search terms in a third-party system like those of the jobbers or that kind of thing. OpenURL resolution would make sense — although the solutions for a library staff member would look different from that for an end user.

ATG: *Let's close with a little speculation. What sort of convergence do you see between traditional ILS systems and this new generation — which is more focused on federated search and linking?*

SR & HS: We're already seeing in RFPs for traditional library systems that if you don't offer federated search and OpenURL link resolving, you'll probably have a harder time playing. So we are seeing these requirements, and I think the challenge is to make sure that these components "play well" with standard integrated library systems.

ATG: *Do you see them replacing the traditional ILS?*

SR & HS: I don't think so, because you still need all the back-office functionality and transaction support for Acquisitions and Circulation etc. that you get in a traditional system. I think what's likely to change is the OPAC — perhaps the OPAC will be less centered on the traditional print collection and provide a much more expansive view of the world of information that the library owns or licenses on behalf of its users. 🌱

the link might take the user to a sign-in screen,

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Editor's Note: Watch for our interview with Roger in the June issue of ATG. Coming Soon! — KS

Name: Roger Press

Born & lived: UK and US.

Early life: Passionate about piano.

Family: Wife **Tamara**, Fellow at **Clare College**, Cambridge (English Literature — Ph.D. on Henry James) and two wonderful sons.

Education: Oxford plus University of Life.

First job: Bus boy at **Mortimer's Restaurant**, New York.

Professional career and activities: Ensuring classical music is accessible and enjoyable.

In my spare time I like to: Rollerblade in Hyde Park with my children and play the piano.

Favorite book: *The Golden Bowl*.

Pet peeves/what makes me mad: When London is not cold enough for snow to stay on the ground!

Philosophy: Art (paintings, music, dance, theater, literature) enables people to function.

Most meaningful career achievement: Starting up **Classical.com**.

Goal I hope to achieve five years from now: **Classical.com** in every library.

How/Where do I see the industry in five years: In five years the music industry expects to sell a significant proportion of its recordings in digital formats, which customers will access using computing devices. One could say that the next format (after Vinyl, Tape and CDs) is the digital format. People can listen to music online or with various devices (PCs, mobile phones, PDAs, MP3 players etc.). The **Classical.com** service enables libraries to be part of this future of digital music by offering a compelling collection of classical music recordings and reference materials to their communities. Remote access to the **Classical.com** database through the Library will enable library patrons to access the service "without walls" ensuring that libraries remain an important part of their communities, reaching into peoples' lives. 🌱

people profiles encouraged